Chapter

Query Tool





CHAPTER 7 – QUERY TOOL

he **Query Tool** module is closely related to the Data Repository module which provides long term repository for research data. By combining the power of the GUID and the use of standard vocabulary via CDEs, the *query tool* provides a powerful means to filter through volumes of aggregated research data across studies.

The *Meta Study* is integrated into the Query Tool, allowing researchers to send data and query to a Meta Study by just clicking on the "*Send to Meta Study*" button. Other modules like Data Repository and Data Dictionary, Download Tool (which allows users to download data selected in the Query Tool) are also integrated into the Query Tool.

7.1 OBJECTIVE

This chapter provides information for users on how to:

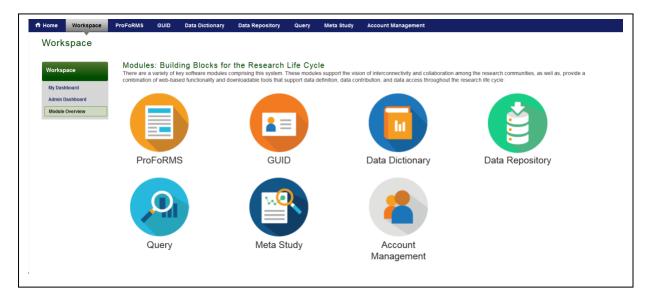
- ❖ Search for studies and/or forms using filters and free text search
- ❖ Filter data by any data element and/or value
- ❖ Quickly and efficiently gain an understanding of data that is in the system
- ❖ Download data



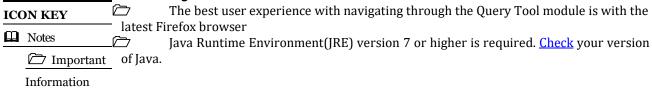
7.2 Using Query Tool

To access the **Query Tool:** Perform the following actions:

- 1. Login to the system.
- 2. Navigate to the Workspace landing page



Things to Note:

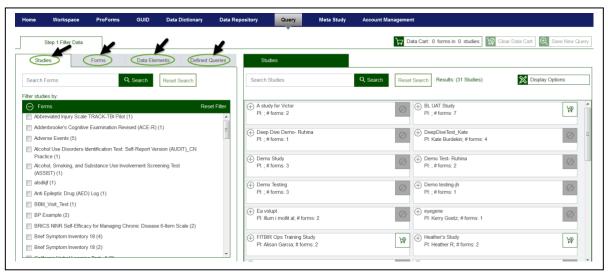




3. Click the Query module or Click on Query located on the top bar of the Workspace page.



4. The first step in the query tool is to "Filter Data". From the main query page, you may search for studies using a variety of options: *Studies, Forms, Data Elements, Defined Queries*.



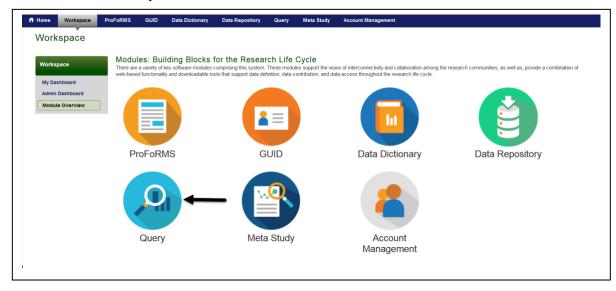


7.2.1 Filtering/Displaying Data Using Select Criteria

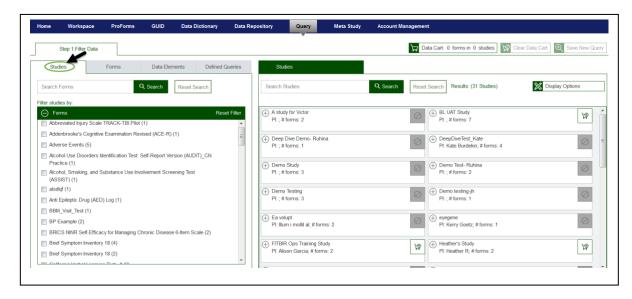
Filtering and Displaying data using the select criteria is one of the most important functions of the Query tool.

To filter/display data using the select criteria tab: Perform the following actions:

- **1.** Login to the system.
- 2. Navigate to the Workspace landing page.
- **3.** Click the **Query** module.

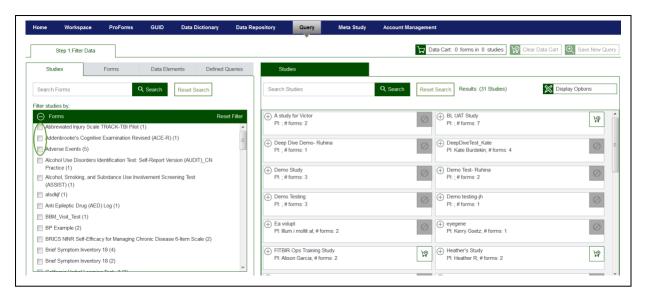


4. Select the **Studies** tab to **Step 1: Filter Data.**

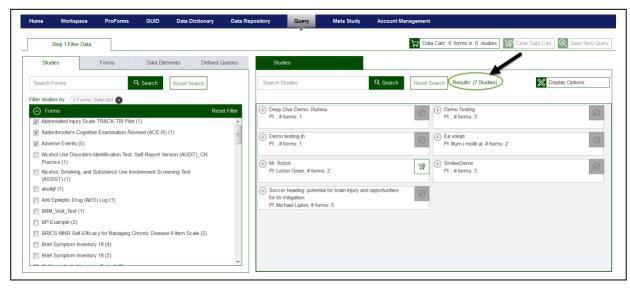




5. Filter studies by selecting the **check-box** beside the desired form name.



6. Click on the Form name in the left pane, data will be displayed in the right pane indicating the number of rows of data on the right-hand pane upper corner.

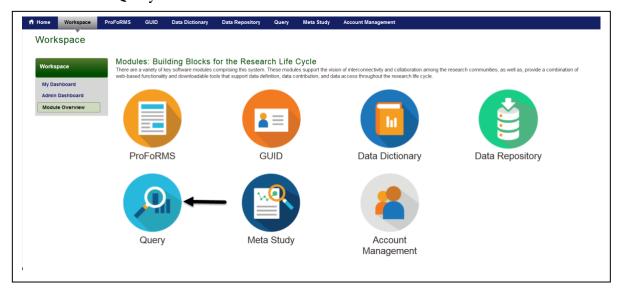




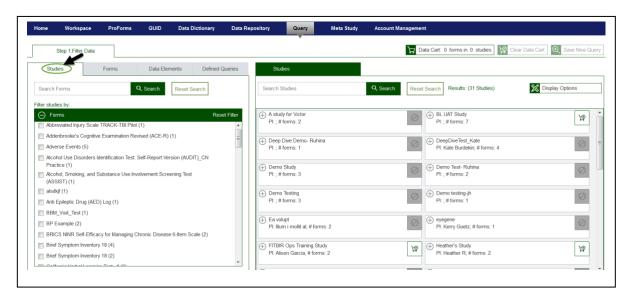
7.2.2 Search Forms (Studies)

To search forms, filtered by studies: Perform the following actions:

- 1. Login to the system.
- 2. Navigate to the Workspace landing page.
- 3. Click the **Query** module.

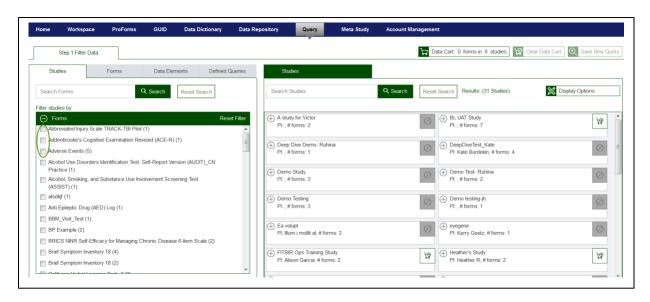


4. Select the Studies tab to Step 1: Filter Data.

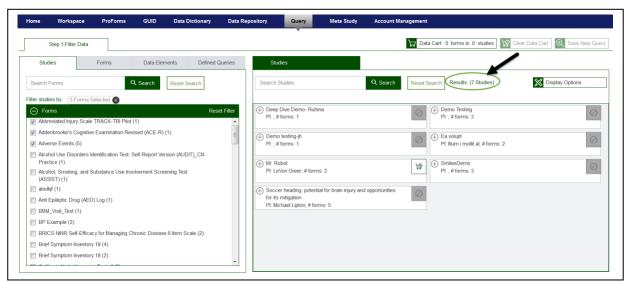




5. Filter studies by selecting the **check-box** beside the desired form name.

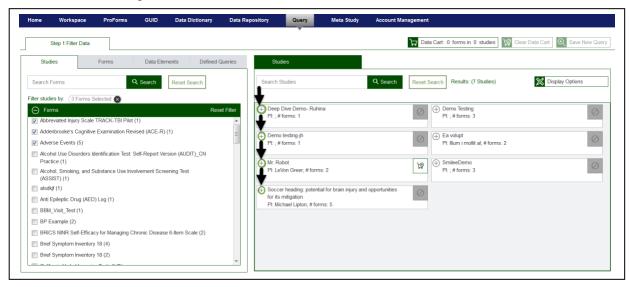


6. The results are displayed on the right-pane of the window.

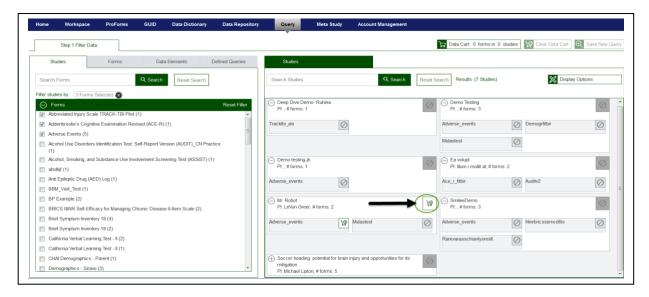




7. To better narrow your search to the appropriate results, click on the + expandable buttons to expand the results.

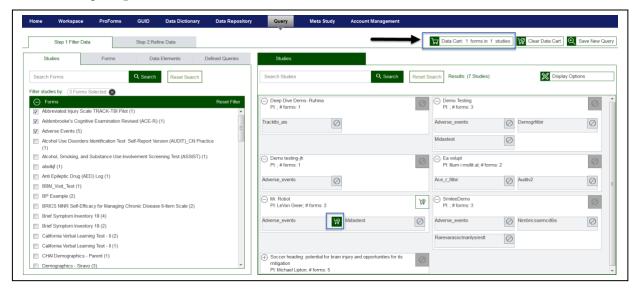


8. Click on the "**Shopping Basket**" icon beside the desired query result to add the form and/or studies to your Data Cart.

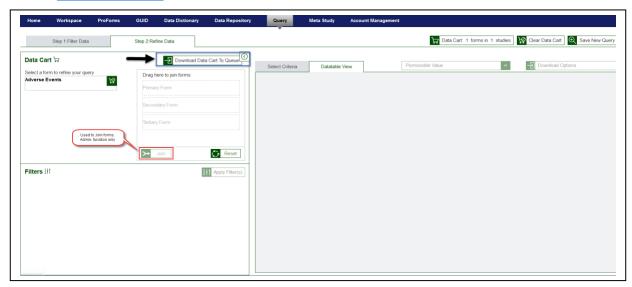




9. Click on the "Data Cart" icon containing your selected forms and studies to continue to step Step 2: Refine Data.

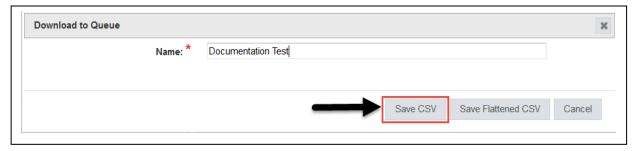


10. On the Step 2: Refine Data tab, click on the Download Data Cart Queue to download the associated data/dataset to the Download Queue. Note: Refer to the Download Tool module on how to download the data.

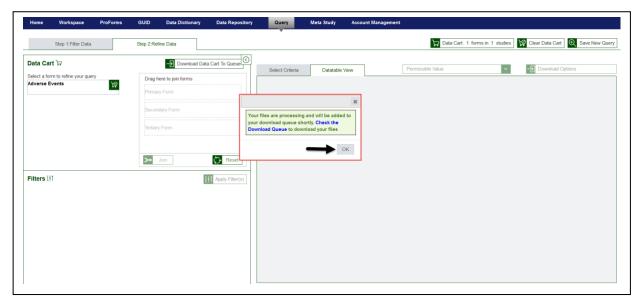




11. The Download Queue dialog box opens. Enter the Name for the download and click the Save CSV button. You may select the "Save Flattened CSV" button is you wish to save the data in this format.



12. A confirmation dialog page appears with the message below: "Your files are processing and will be added to your queue shortly. Check the Download Queue to download your files. You may click on the "Check Download Queue" to directly be redirected to the Data Repository module where you can launch the Download Tool, run the download tool, and start downloading your selected data. Note: Choosing to be redirected to the Data Repository will not terminate your Query Tool session. Rather, upon return to the Query tool, the system will notify you that your previous session is still available and if you would like to reload it. Click **OK** button.





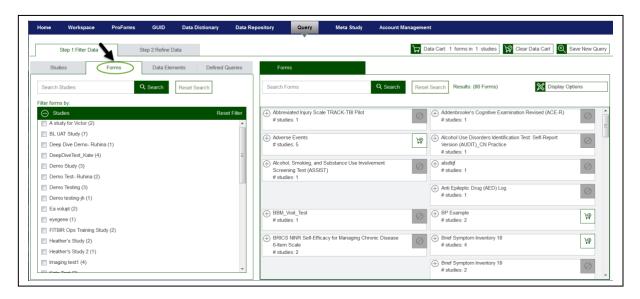
7.2.3 Search Studies (Forms)

To search for Forms, Filtered by Studies: Perform the following actions:

- 1. Login to the system.
- 2. Navigate to the Workspace landing page.
- 3. Click the **Query** module.

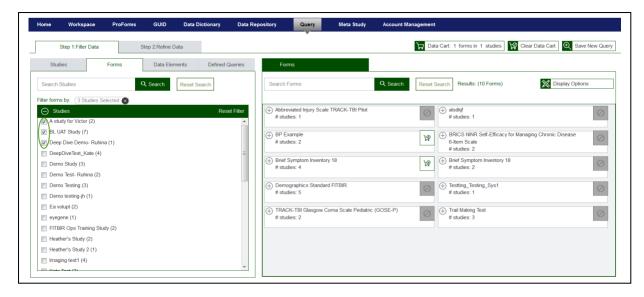


4. Select the Forms tab.

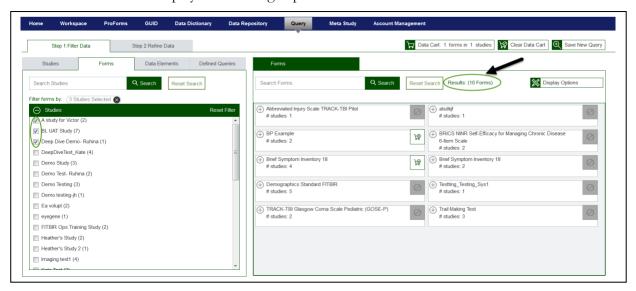




5. Filter Forms by selecting the check-box beside the desired studies name located on the left-pane. The filtered forms will appear on the right-pane as shown below.

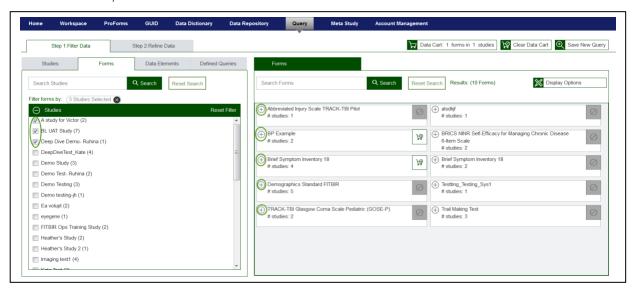


6. The results are displayed on the right-pane of the window.

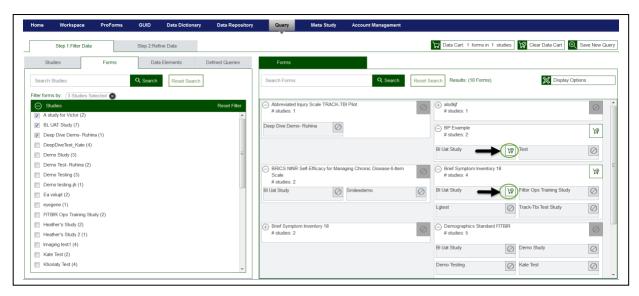




7. To better refine your search results to the appropriate results, click on the + expandable buttons to expand the results. To better refine your search to the appropriate results, click on the + expandable buttons to expand the results. Note: By simply checking the individual data elements in the left pane refined the data further to the forms that use that data element. The grayed-out results indicate that an Admin right is required to access these elements/forms.

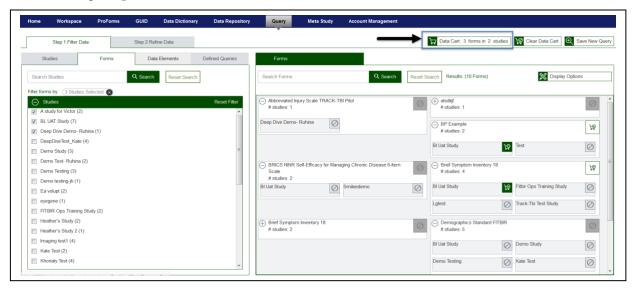


8. Click on the "**Data Cart**" icon beside the desired query result to add the form and/or studies to your basket.

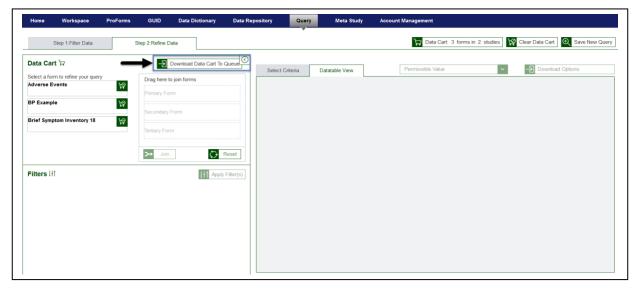




9. Click on the "Data Cart" icon containing your selected forms and studies to continue to step Step 2: Refine Data.

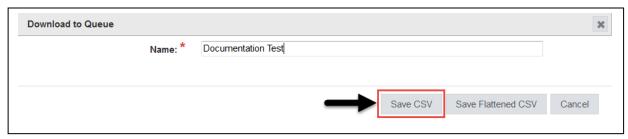


10. On the Step 2: Refine Data tab, click on the Download Data Cart Queue to download the selected forms and/or studies to the Download Queue. Data selected on all forms can be downloaded and will appear as separate files in the download set.
Note: Refer to the Download Tool module on how to download the data.

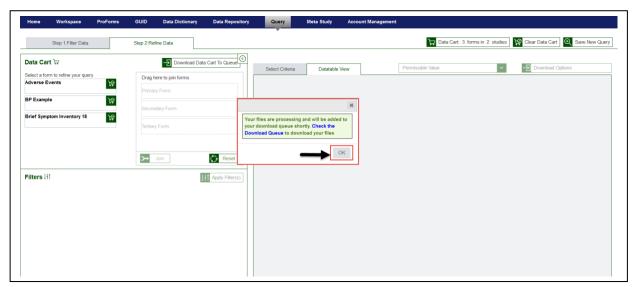




11. The Download Queue dialog box opens. Enter the Name for the download and click the Save CSV button. You may select the "Save Flattened CSV" button is you wish to save the data in this format.



12. A confirmation dialog page appears with the message below: "Your files are processing and will be added to your queue shortly. Check the Download Queue to download your files. You may click on the "Check Download Queue" to directly be redirected to the Data Repository module where you can launch the Download Tool, run the download tool, and start downloading your selected data. Note: Choosing to be redirected to the Data Repository will not terminate your Query Tool session. Rather, upon return to the Query tool, the system will notify you that your previous session is still available and if you would like to reload it. Click **OK** button.

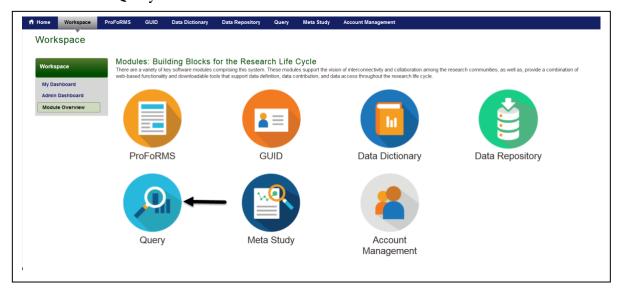




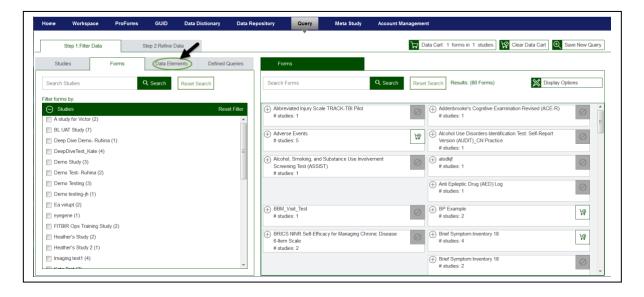
7.2.4 Search Data Elements (Forms)

To search for forms, filtered by studies: Perform the following actions:

- 1. Login to the system.
- 2. Navigate to the Workspace landing page.
- 3. Click the **Query** module.

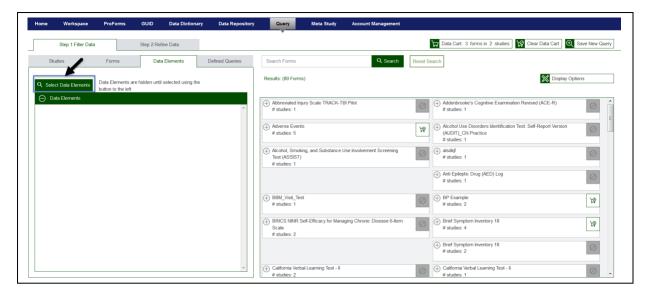


4. Select the **Data Elements** tab. The results are displayed on the right-pane of the window.

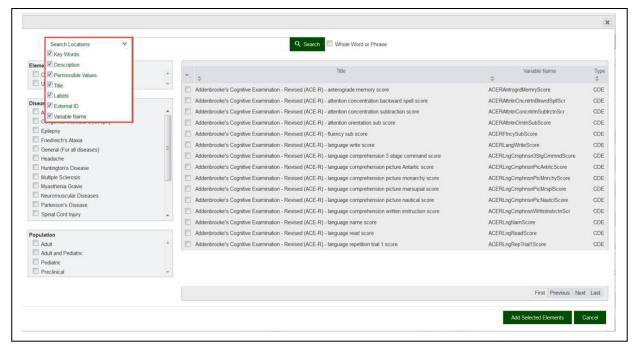




5. Data Elements are hidden from the Dashboard until selected using the search button to the left. Click the "**Select Data Elements**".

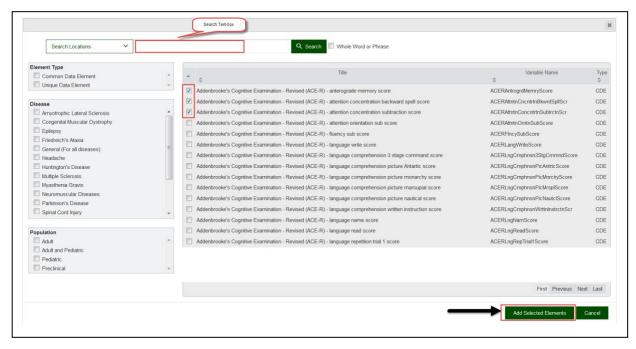


6. The Search Data Elements page appears. From the drop-down menu located on the top-left corner, select the "**Search Locations**" are displayed on the right-side of the window.

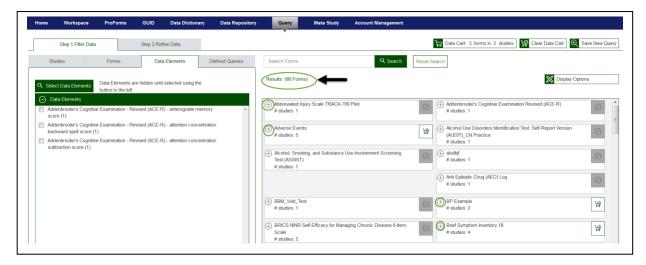




7. You may enter your search criteria in the search text-box and click the "Search" button to search <u>OR</u> select the check-box beside the Tittle of the Data Element. Click the **Add** Selected Elements button.

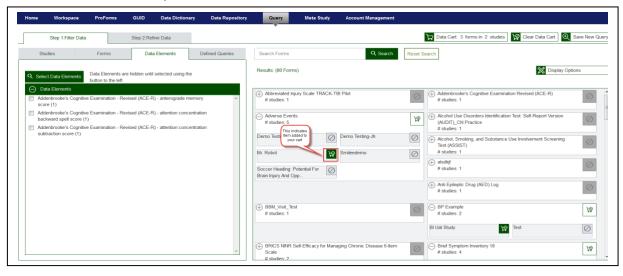


- 8. The selected Data Elements returns 80 forms as shown below. To better refine your search to the appropriate results, click on the + expandable buttons to expand the results. Note: By simply checking the individual data elements in the left pane refined the data further to the forms that use that data element.
 - The grayed-out results indicate that an Admin right is required to access these elements/forms.

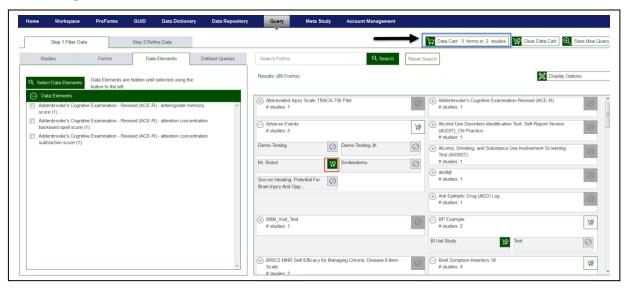




9. Click on the "**Shopping Basket**" icon beside the desired query result to add the form and/or studies to your basket.

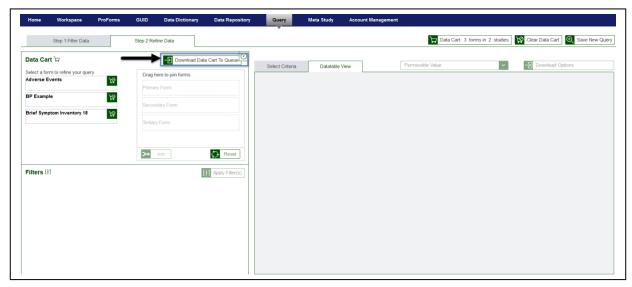


10. Click on the "Data Cart" icon containing your selected data elements to continue to step Step 2: Refine Data.

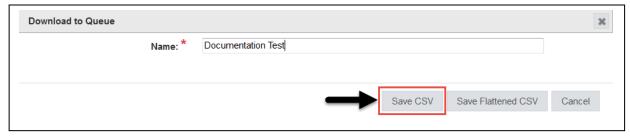




11. On the Step 2: Refine Data tab, click on the Download Data Cart Queue to download the selected forms and/or studies to the Download Queue. Note: Refer to the Download Tool module on how to download the data.

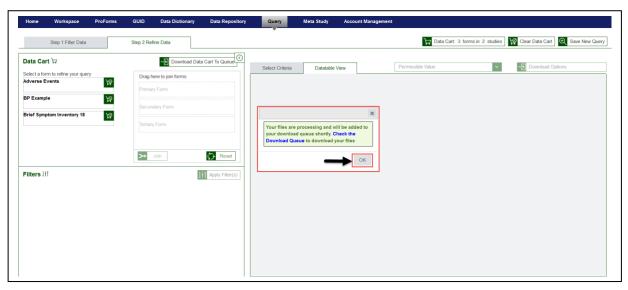


12. The Download Queue dialog box opens. Enter the name for the download and click the Save CSV button. You may select the "Save Flattened CSV" button is you wish to save the data in this format.





13. A confirmation dialog page appears with the message below: "Your files are processing and will be added to your queue shortly. Check the Download Queue to download your files. You may click on the "Check Download Queue" to directly be redirected to the Data Repository module where you can launch the Download Tool, run the download tool, and start downloading your selected data. Note: Choosing to be redirected to the Data Repository will not terminate your Query Tool session. Rather, upon return to the Query tool, the system will notify you that your previous session is still available and if you would like to reload it. Click **OK** button.

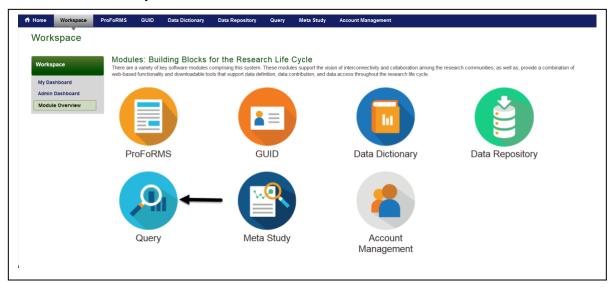




7.2.5 Search Defined Queries (Studies)

To search for Defined Queries filtered by studies. See <u>Section 7.2.5</u> on how to create defined queries: Perform the following actions:

- 1. Login to the system.
- 2. Navigate to the Workspace landing page.
- 3. Click the **Query** module.

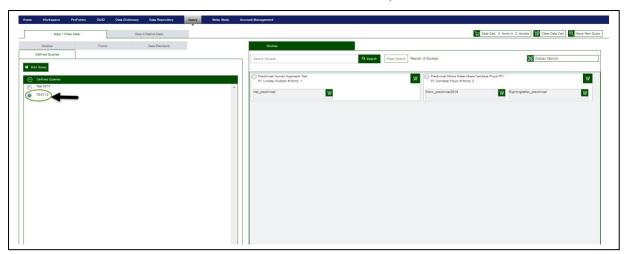


4. Select the **Defined Queries** tab.

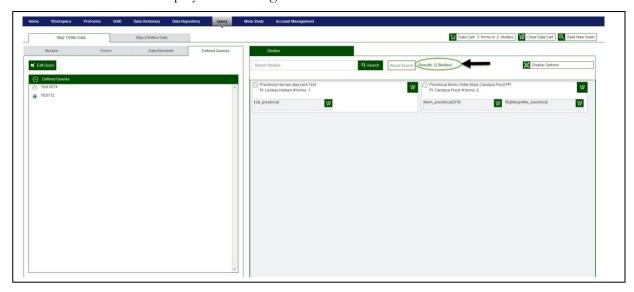




5. Select the check-box beside the desired Defined Query name.

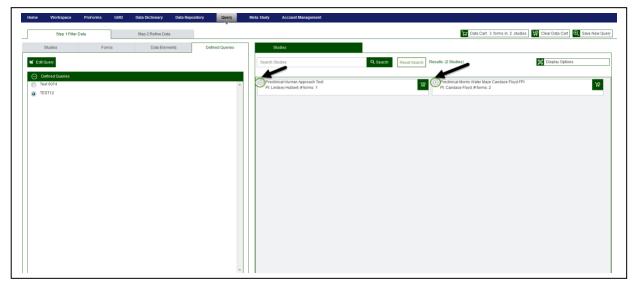


6. The results are displayed on the right-side of the window.

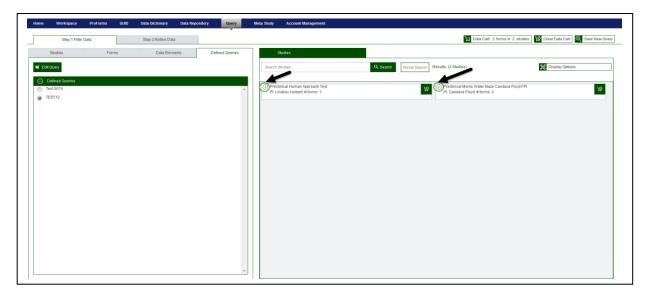




7. To better narrow your search to the appropriate results, click on the + expandable buttons to expand the results.

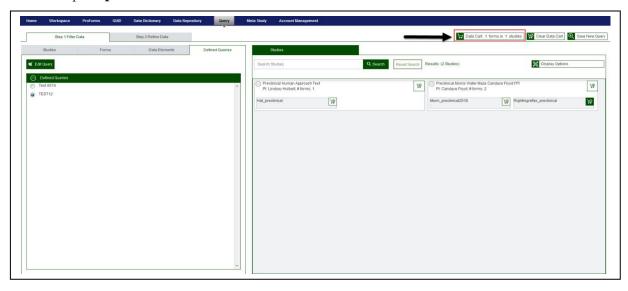


8. Click on the "**Data Cart**" icon beside the desired query result to add the form and/or studies to your basket.

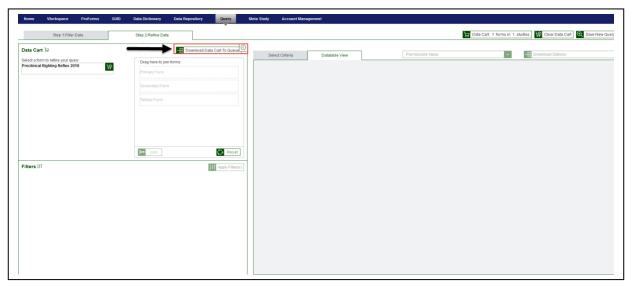




9. Click on the "Data Cart" icon containing your selected queries and studies to continue to step Step 2: Refine Data.



10. On the Step 2: Refine Data tab, click on the Download Data Cart Queue to download the selected defined queries and studies to the Download Queue. Note: Refer to the Download Tool module on how to download the data.

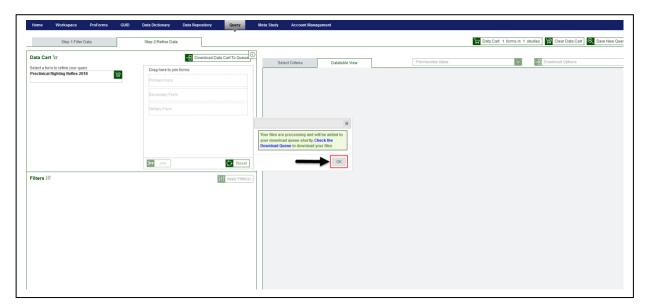




11. The Download Queue dialog box opens. Enter the Name for the download and click the Save CSV button. You may select the "Save Flattened CSV" button is you wish to save the data in this format.



12. A confirmation dialog page appears with the message below: "Your files are processing and will be added to your queue shortly. Check the Download Queue to download your files. You may click on the "Check Download Queue" to directly be redirected to the Data Repository module where you can launch the Download Tool, run the download tool, and start downloading your selected data. Note: Choosing to be redirected to the Data Repository will not terminate your Query Tool session. Rather, upon return to the Query tool, the system will notify you that your previous session is still available and if you would like to reload it. Click OK button.





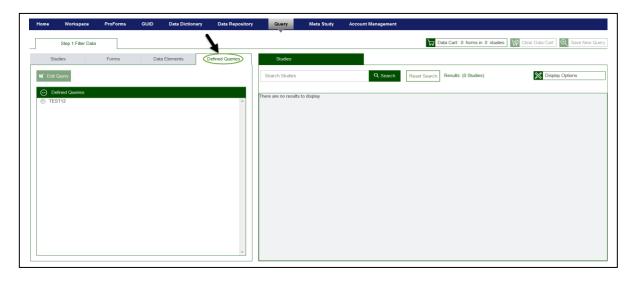
7.2.6 Create Defined Query

To create Defined Query: Perform the following actions:

- 1. Login to the system.
- 2. Navigate to the Workspace landing page.
- 3. Click the **Query** module.

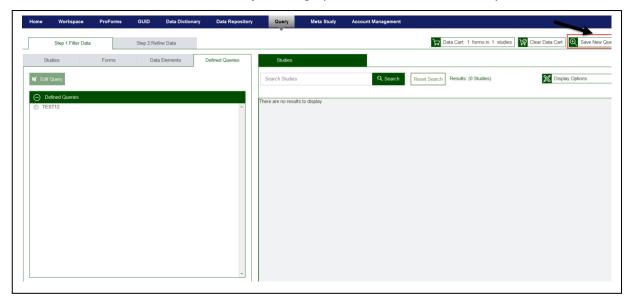


4. Queries can be saved from any of the sections previously defined (forms/studies/DEs) using the "Save New Query" button. It is not restricted just to the Defined Queries tab. Select the **Defined Queries** tab.





5. Click on the "Save New Query" to display the "Create Defined Query" window

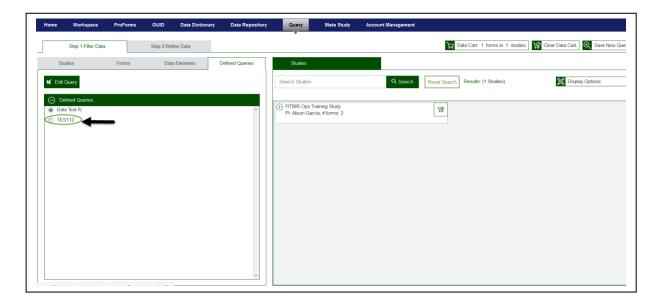


6. Enter the Name of the defined query in the name text-box. From the drop-down menu, select the Group/User name to grant permission to the query and click the "Save" button to create the defined query.





7. The newly created defined query appears in the Defined Queries list as shown below:





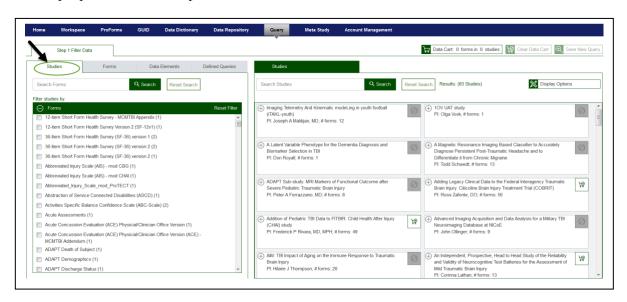
7.2.7 Joining Forms

Joined forms are useful for filtering a subset of data based on the order of the join. **To join forms:** Perform the following actions:

- 1. Login to the system.
- 2. Navigate to the Workspace landing page.
- 3. Click the **Query** module.

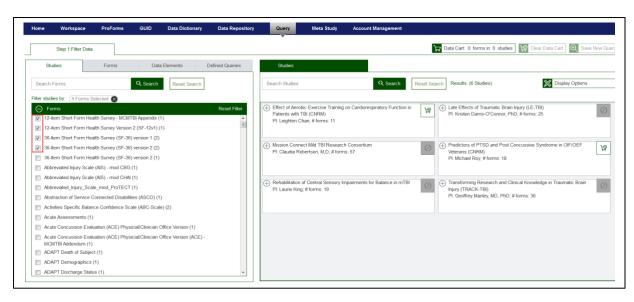


4. Select either the **Studies**, **Forms**, **Data Elements**, or **Defined Queries** tab. For this purpose of this example, the **Studies** tab is selected.

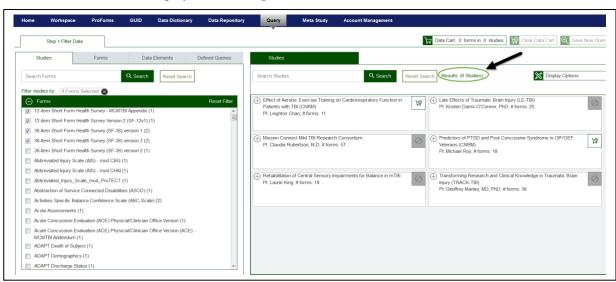




5. Filter studies by selecting the check-box beside the desired form name.



6. The results are displayed on the right-side of the window.





7. To better narrow your search to the appropriate results, click on the + expandable buttons to expand the results.

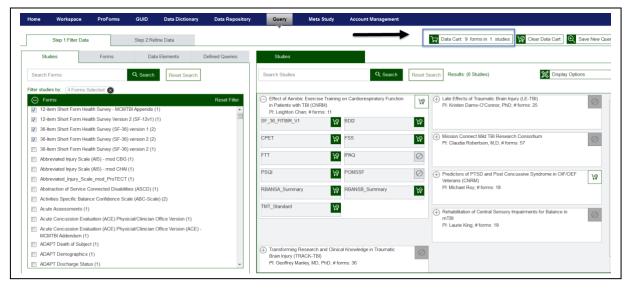


8. Click on the "**Shopping Basket**" icon beside the desired query result to add the form and/or studies to your basket.



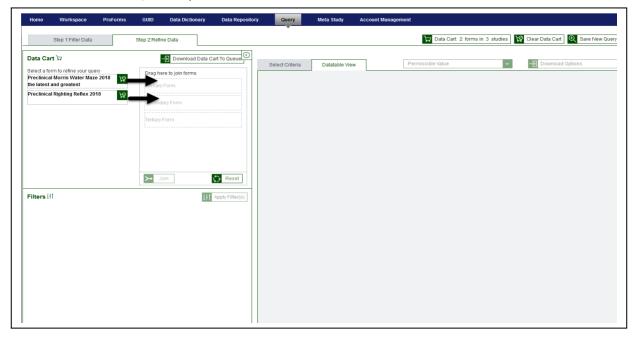


9. Click on the "Data Cart" icon containing your selected forms and studies to continue to step Step 2: Refine Data.



10. On the Step 2: Refine Data tab, click on the "Data Cart" and then drag the form to the empty block on the right pane. This is a Left-Join, so filtering/refining of data is done based on the first form added.

Note: You may only join queries containing 2 forms. The maximum number of forms allowed for a join may not exceed 3.

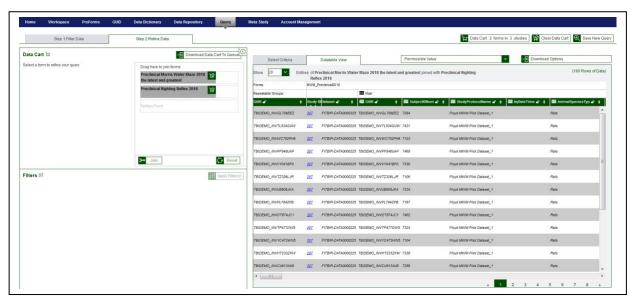




11. Upon dragging the forms into the empty block, click the "Join" button.



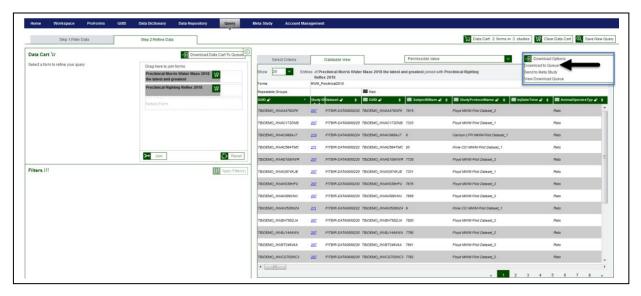
12. The joined forms are now contained in the query and displayed in the right pane. This is the subset or refined data based on the left join.



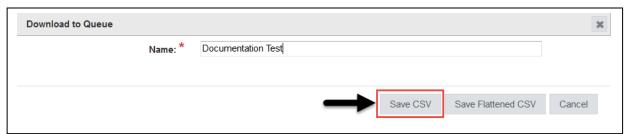


13. In the Datatable View, click on the "Download Options" icon containing your joined forms and studies to continue to select your downloading options: 1: Download to Queue; 2: Send to Meta Data; 3: View Download Queue. In this example, we will select – Download to Queue.

Data selected on all forms can be downloaded and will appear as separate files in the download set. **Note**: Refer to the **Download Tool** module on how to download the data.

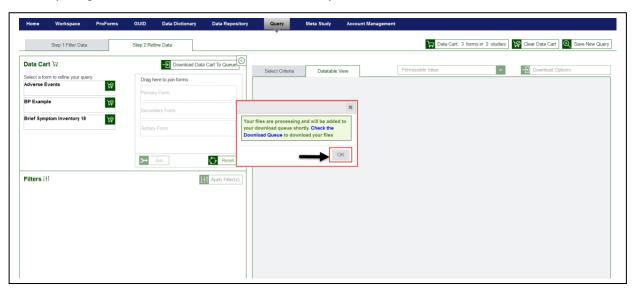


14. The Download Queue dialog box opens. Enter the Name for the download and click the **Save CSV** button. You may select the "Save Flattened CSV" button is you wish to save the data in this format.





15. A confirmation dialog page appears with the message below: "Your files are processing and will be added to your queue shortly. Check the Download Queue to download your files. You may click on the "Check Download Queue" to directly be redirected to the Data Repository module where you can launch the Download Tool, run the download tool, and start downloading your selected data. Note: Choosing to be redirected to the Data Repository will not terminate your Query Tool session. Rather, upon return to the Query tool, the system will notify you that your previous session is still available and if you would like to reload it. Click **OK** button.





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